

SOUTH EASTERN ONTARIO

Research and Insights Forum

RTO9 Tourism Partners

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Alphabet

February 25, 2018

Agenda – What's Ahead this Morning?

Timing	Session Description	Lead
9:30am to 10:15am	<p>The Outlook for 2019</p> <ul style="list-style-type: none"> • Presentation on consumer and market trends drawn from a selection of relevant research • What are the implications for RTO and regional destinations? 	Oliver
10:15am to 11:30am	<p>Research Roundup</p> <ul style="list-style-type: none"> • Review of RTO9's 2018 research outputs: Consumer and Industry Insights surveys; Monthly newsletter; Web portal; Macro data analysis; EQ segmentation • How do I use the research as part of my planning process and marketing efforts? 	Oliver & Erica
1130am to 11:45am	Bio Break	
11:45am to 12:30pm	<p>Making Sense of Web Analytics</p> <ul style="list-style-type: none"> • Presentation and discussion session on website and online marketing data • What data points are relevant and how do I interpret the data? 	Cathy
12:30pm to 1:00pm	<p>The 2019 RTO9 Consumer Insights Survey (Tracking Wave)</p> <ul style="list-style-type: none"> • Review of the purpose and data outputs of the 2018 pilot wave survey • Discuss updates for 2019 and roles and responsibilities of DMOs/DMPs to achieve a higher response rate and granularity at the destination level 	Erica

RTO9's Multi-year Research and Insights Plan



**Regional Tourism
ORGANIZATION**

Year 1: April 1 2018 to March 31 2019

Year 2: April 1 2019 to March 31 2020

Year 3: April 1 2020 to March 31 2021

	Year 1: April 1 2018 to March 31 2019	Year 2: April 1 2019 to March 31 2020	Year 3: April 1 2020 to March 31 2021
Primary Initiatives	<ol style="list-style-type: none"> 1. Consumer Insights Survey (1 wave - Pilot) 2. Industry Insights Survey (1 wave – Pilot) 	<ol style="list-style-type: none"> 1. Consumer Insights Survey (2 waves) 2. Industry Insights Survey (2 waves) 3. Brand Assessment Study (Destination Canada) 	<ol style="list-style-type: none"> 1. Consumer Insights Survey (2 waves) 2. Industry Insights Survey (2 waves) 3. Brand Assessment Study
Secondary Initiatives	<ol style="list-style-type: none"> 1. Visitor Statistics 2. Consumer Segmentation 3. Visitor Attraction Tracking 4. Data Sets Analysis 	<ol style="list-style-type: none"> 1. Visitor Statistics 2. Consumer Segmentation (Destination Canada) 3. Visitor Attraction Tracking 	<ol style="list-style-type: none"> 1. Visitor Statistics 2. Consumer Segmentation
Communication and Dissemination Initiatives	<ol style="list-style-type: none"> 1. Industry Newsletter (launch) 2. Industry Forum/Research Training Workshop 3. Set up of Web Portal 4. Set up of Standardized Metrics 	<ol style="list-style-type: none"> 1. Industry Newsletter 2. Refinement of Web Portal 3. Full Roll-Out of Standardized Metrics 	<ol style="list-style-type: none"> 1. Industry Newsletter 2. Industry Forum 3. Refinement of Web Portal 4. Full Roll-Out of Standardized Metrics

The Outlook for 2019



International Tourism to Canada on the Rise

Traditional markets UK, Japan and Germany are changing.



- In 2018, international overnight arrivals to Canada reached a new height of **21.13 million** visitors, surpassing the record level previously achieved in 2017 by 1.2% and breaking the 21 million mark for the first time ever.
- While total arrivals from Destination Canada's long-haul markets in 2018 remained on par with 2017, several key markets reached new milestones.
- China, France, and Mexico surpassed the 700K, 600K, and 400K marks, respectively, for annual visitors to Canada for the first time in 2018. Meanwhile, India climbed to our 7th largest inbound market.

International Tourism to Canada on the Rise, cont'd

Traditional markets UK, Japan and Germany are changing.



International Tourism to Canada on the Rise, cont'd

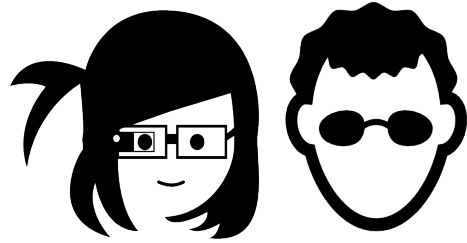
3 major trends are driving these changes.



- 1) Wealth generation and the growth of world's middle class
- 2) Commoditization of travel
- 3) Technology empowering consumers

International Tourism to Canada on the Rise, cont'd

3 major market shifts will impact Ontario tourism.



1/
Millennial
Travellers
and those
aligned will
dominate
by 2031



2/
Local and
authentic and
community
tourism will rule



3/
Technology will
drive consumer
behavior and
tourism
marketing

International Tourism to Canada on the Rise, cont'd

Overseas visitation to Canada is growing at a larger rate than US visitation.



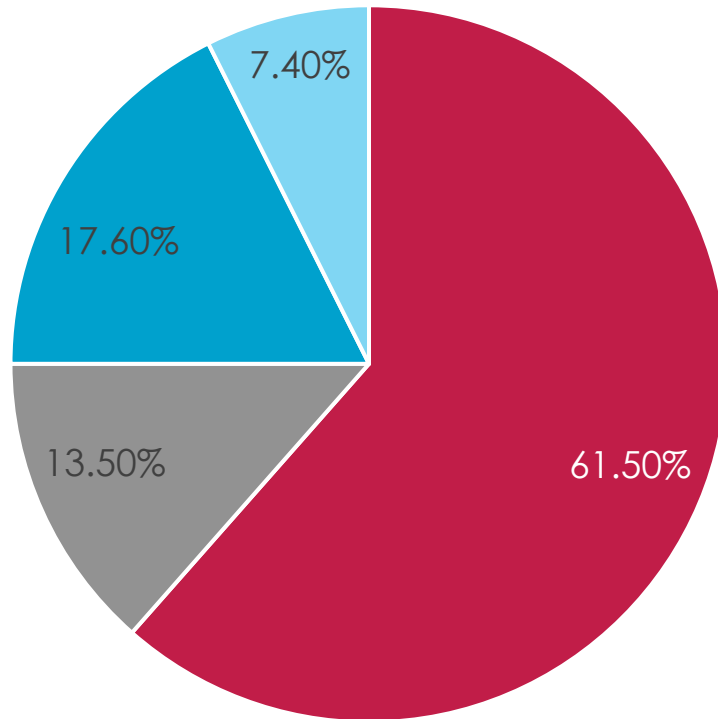
Overseas visitors reached an all-time high of 6.7M, representing 32% of total arrivals.



Direct air capacity soared by 6% to the highest level ever and represents an additional 2M seats on inbound flights.

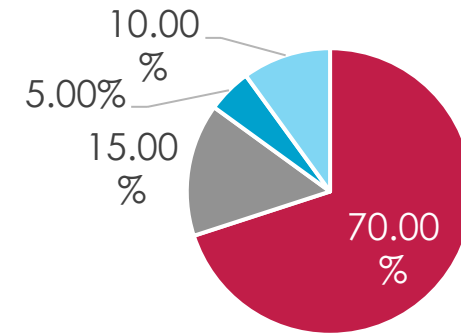
International Tourism to Canada on the Rise, cont'd

Share of visitor spend in Ontario - 2017 data.



■ Ontario ■ US ■ Overseas ■ Canada (excluding Ontario)

1999-2000

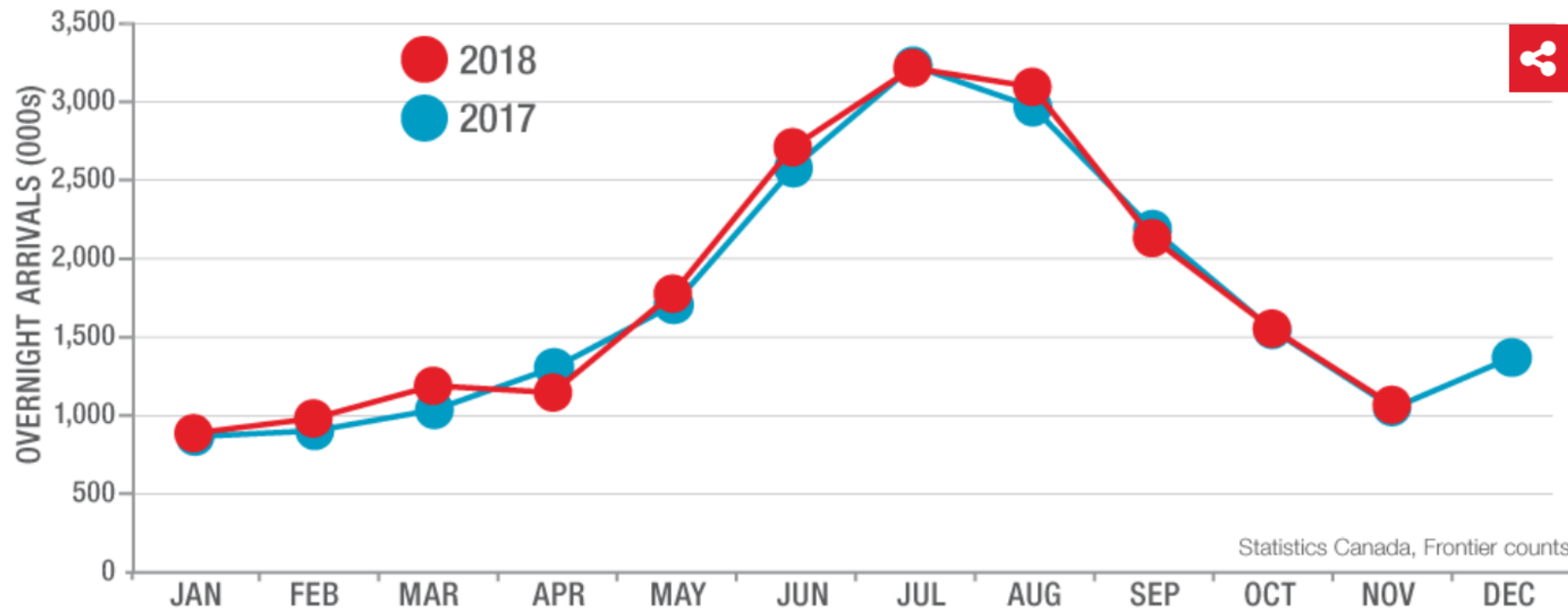


■ Ontario
■ US
■ Overseas
■ Canada (excluding Ontario)

International Tourism to Canada on the Rise, cont'd

Seasonality continues to be a major issue and opportunity.

Total International Arrivals to Canada



International Tourism to Canada on the Rise, cont'd

Air Canada's international growth plans will drive this shift.



International Tourism to Canada on the Rise, cont'd

RTO9 will need to evolve its overseas visitation potential.



- RTO9's bread and butter will always be a combination of 1) short domestic getaways (Regional; GTA; Ottawa/Montreal); and 2) VFR.
- The future and potential market will shift to more overseas visitation:
 - Dispersal beyond GTA
 - VFR
- RTO9 must start adapting both its product and service offering and marketing message to 1) build brand awareness; 2) develop the sales channels (i.e., travel trade)
- THIS YEAR: 1) New Federal Tourism Strategy (focusing on supply side); 2) New Ontario Tourism Strategy.

Research Roundup



Why use research?

Market research and robust metrics help companies in all fields make better decisions and develop their businesses.

Within the industry, market research plays a vital role in helping to create compelling products and experiences, to market effectively to the trade and to consumers, and develop and manage destinations. The RTOs and DMOs that have both clearly-defined market research programs – and the trained staff that are able to manage them – are able to be more effective in all these areas than their peers.

Understand
the market

Understand how the market is changing within Canada and around the world, how this will impact RTO9, and what peers and competitors are doing (i.e., trend and competitive analysis);

Reach target
audiences

Target consumers more effectively thanks to a better understanding of which trade channels and partners they need to engage, and which consumer segments show most promise;

Measure
performance

Measure the performance of the tourism industry in RTO9 more robustly, and help make the business case for increased government support and industry partnership;

Match
demand

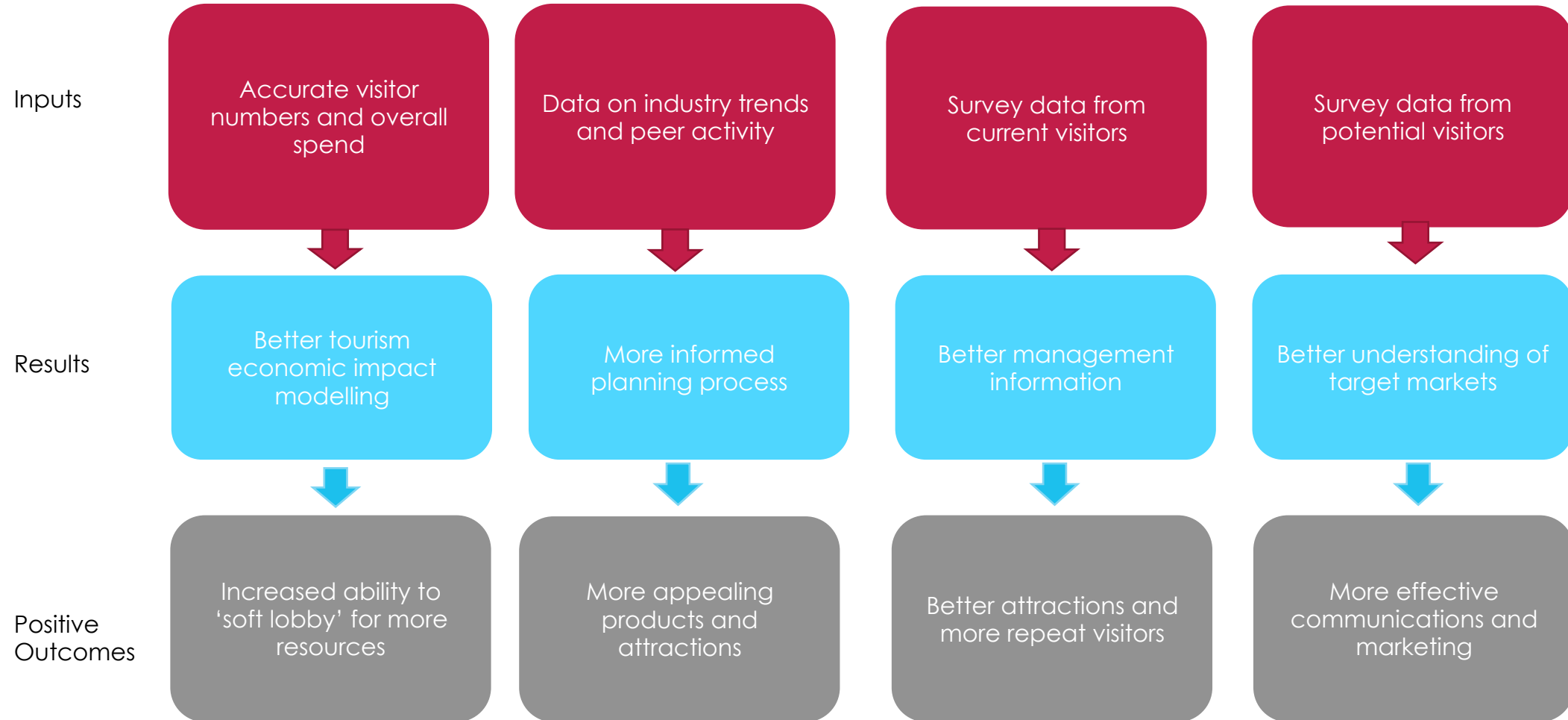
Develop RTO9's tourism products and experiences to better match demand;

Build capacity

Build capacity among DMOs and operators in RTO9 to allow them to be more effective in marketing, service delivery and sustainably managing tourism.

From inputs to outcomes: how research drives success

Research follows a logical flow: specific research inputs can lead to results and positive business outcomes.



The Research Process

A sound research process is the foundation for good research that is both useful and valuable.



Primary vs. Secondary Research

All research data comes from two types of sources: primary or secondary.

Secondary

Secondary research is the summary, collation and/or synthesis of research that already exists.

Types of secondary research sources:

- Government census reports
- Economic data
- Agency reports
- Surveys by trade and industry associations and government
- Private research firms
- Sales reports
- Sector profiles

Primary

Primary research is conducted to discover original or raw data so that a previously unexplored issue can be examined.

Types of primary research sources:

- Website data
- Visitor records
- Surveys
- Interviews

Although emails are ever increasing, they serve a useful purpose for maintaining relationships.

Why do they matter?

Newsletters must be viewed as a long-term investment, they help to: maintain relationships; grow reputations; communicate new information; and keep operators updated on new research and initiatives.

Guidelines for an effective Industry Newsletter

- Engaging, lively content
- Targeted to the audience
- Intelligent design
- Mobile-friendly: A 2018 study found that 59 percent of email is now opened first on mobile devices
- Regularly gaining new subscribers



RTO 9 @RTO9_CA · 11 Jun 2018
Keep up to date on the latest news from RTO 9 by joining our newsletter! 
ow.ly/mESw30kcqwh #TourismMatters #RTO9 @TIAC_AITC @TIAOtweets



Newsletter Sign Up - Tourismtalk
Join In! Be the first to know about new opportunities, promotions, and industry news. Keep up to date on the latest news from RTO 9 by joining our mailing list. * We ...
tourismtalk.ca

Industry Newsletter

Since June 2018, RTO9 has released 8 industry newsletters with valuable insights and information.



Overview

What	Publish an operator and DMO focused insights newsletter
How	<ul style="list-style-type: none">- Using open-source and RTO9 led-research activities craft a monthly insights newsletter for RTO9 tourism partners
Lead	<ul style="list-style-type: none">- Lead: RTO9
Timeline	<ul style="list-style-type: none">- Year 1 launch the newsletter- Ongoing for Year 2
Outcomes	<ul style="list-style-type: none">- Better disseminate research and offer a key operator and DMO learning benefit

Results to Date

Industry Newsletters have been disseminated by email and made available on Tourism Talk monthly since June 2018. Topics have included Signature Experience development, Innovation, Fall themes, Survey Results and more.

The average open rate for the Tourism Talk Newsletter is 33%, far exceeding the all industry average open rate of 20.8%.



Past Content Sources

- Skift
- PhocusWright
- Travel Weekly
- OTMPC
- TIAO
- MTCS
- Destination Canada
- UNWTO
- Industry event calendars
- Peer destinations marketing organizations
- RTO9 primary research

Discussion

1. What do your operators want to see more of?
2. Do you have resources or reports that can be shared?
3. Are there any operator success stories that we can highlight?



Every month we'll be sending you the **latest insights, research and thoughtful perspectives on the issues that matter most** to tourism businesses and operators in RTO9.

In this month's newsletter we provide you with an in-depth analysis on unique and signature experience development – ideas, trends and inspiration! If there are topics you want to read about in a future newsletter **please email:**
lmedeiros@thegreatwaterway.com

What is a survey?

A survey is the process of describing some aspect(s) of a population or group of people based on a sample of the total. Visitor surveys (questionnaires) are the most common type of tourism research.

Design

Insights surveys follow the six step research process and additionally include developing and testing the survey. Business objectives for consumer surveys tend to revolve around visitor profiles, perceptions, awareness and/or spending. Industry survey typically concern outlook, trends and patterns.

Survey Methods

There are three key survey method options that are typically used in tourism:

1. Interviewer-administered
2. Self-administered (printed)
3. Self-administered (online)

Considerations may also include where the survey is conducted (e.g. in person, on site, place of business, at an event).

Types of Questions

Closed-ended (e.g., lists, scales, ranking)

Open-ended (e.g., allows individual responses)

Consumer Insights Survey

We successfully piloted a Consumer Insights Survey in summer 2018.

Overview

What	Regular survey to track actual and potential visitor profiles and behaviour
How	<ul style="list-style-type: none">- Pilot RTO9 consumer database study rolled out to all DMOs with a consumer database- Standardization and tracking of key questions
Lead	<ul style="list-style-type: none">- Lead: RTO9- Support: DMOs/DMPs
Timeline	<ul style="list-style-type: none">- Pilot wave 1 (summer 2018)- 2 waves per year: summer and winter (Year 2), moving to 4 waves per year
Outcomes	<ul style="list-style-type: none">- Improved information to shape regional tourism offering including product and experience development and marketing program- Ability to predict consumer behaviours and trends
Metrics	<ul style="list-style-type: none">- Visitor perceptions; travel patterns; brand assessment

Results to Date

The 2018 pilot survey uncovered important insights about how people discover the region and access information about what it has to offer, the process they go through when planning and booking a trip through to the experience they have when in the region.

Key Issues/Opportunities revealed:

1. Inspiration/Pre-planning: Travellers want to be inspired
2. Booking Options: Online presence lacking key sites (e.g., Expedia, Trip Advisor)
3. Length of Stay: Two nights or less
4. Affordability: Budget conscious travellers
5. Typical activities align with priority areas

Consumer Insights Survey, cont'd

Solutions were developed in part using the survey responses and industry best practices.

Issue	Solution
Inspiration/Pre-planning	Comprehensive websites with accommodation options and events, interactive maps, travel apps, itineraries, social media marketing with the use of quality pictures of the destinations' offerings, increase residents awareness of offerings/ activities for VFR market
Booking	Destinations, hotels and operators need to increase online booking options and presence on Expedia, TripAdvisor etc.
Length of stay	To extend length of stay, develop more packages and itineraries to help guide visitors through the region and thereby increase their awareness of places to explore and activities
Affordability	Budget conscious travellers may be enticed to stay overnight in South Eastern Ontario rather than a more expensive destination such as Ottawa or Toronto. Promotions and discounts may provide further incentive to book an overnight stay

Consumer Insights Survey, cont'd

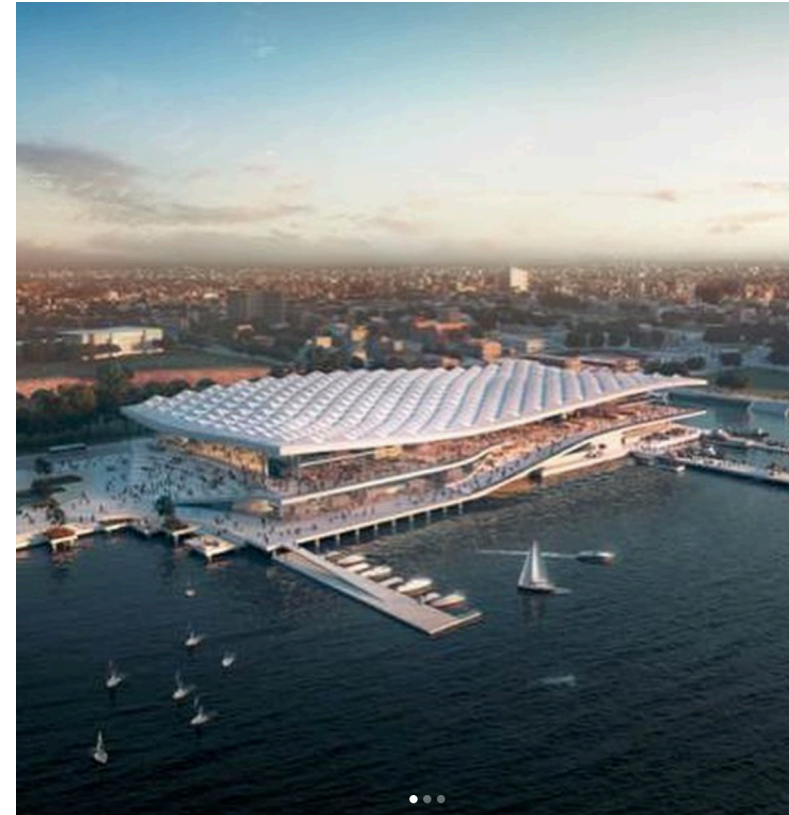
Operators and destinations around the world benefit from the use of consumer insights surveys.

Case Study: Sydney Fish Market

Now a well known tourist destination the Sydney Fish Market attracts three million domestic and international visitors each year. Located in the heart of Sydney, they offer everything from culinary delights to cooking classes and guided tours.

Tourism data has given the Sydney Fish Market a better understanding of the demographics of its visitors, which has informed business decisions including investment in new services and upgrades to facilities.

In 2015 they participated in Tourism Research Australia's annual International Visitor Survey. The data demonstrated rapid growth in Chinese visitors, with this info they were able to validate new strategies. For example, they expanded experience offerings with new Mandarin language Sydney Seafood School classes and introduced Mandarin language 'Behind the Scenes' tours.



Industry Insights Survey

The Industry Insight Survey is a regular forum to capture stakeholder issues, market trends and outlook.

Overview

What	Regular survey of RTO9 regional tourism businesses to assess industry performance and market trends
How	<ul style="list-style-type: none">- Existing stakeholder survey conducted each year to be continued- Collaboration with DMOs/DMPs to boost database of regional tourism operators in sample
Lead	<ul style="list-style-type: none">- Lead: RTO9- Support: DMOs/DMPs
Timeline	<ul style="list-style-type: none">- 2 waves per year (by Year 2): spring and fall
Outcomes	<ul style="list-style-type: none">- Regular forum to capture key stakeholder issues, market trends and outlook
Metrics	<ul style="list-style-type: none">- Industry perceptions; Industry trends

Results to Date

The 2018 pilot survey identified tourism issues and helped provided insight into the outlook and concerns of our most important tourism partners across the region.

Key Issues/Opportunities revealed:

- Locals and visitors from the Greater Toronto Area and Ottawa seen as the most solid customer source markets
- Majority of businesses have invested back into their business by making a few improvements or considerable upgrades this year
- Businesses mostly employed the same amount of people compared to last year
- Social media, websites and online advertising are the most used marketing tactics but viewed as the least important tactic
- The key months that tourism businesses want to grow their business are May, February and October
- Engagement levels highest amongst hotel operators and retail

Industry Insights Survey, cont'd

Higher engagement level can help lead to more reliable data.

Discussion

1. How can we further engage operators and the business community to participate?
2. Have you used industry surveys to inform strategic planning?
3. Are there any success stories that we can highlight?

Research and Insights Hub: Web Portal

The Research and Insights Hub was created with three key objectives in mind: ease of access, relevancy and partnership.

Overview

What	Define a B-to-B web portal to collect, store and communicate research
How	<ul style="list-style-type: none">- Utilize RTO9's industry website and possibly include a semi-dynamic dashboard to host regional performance metrics
Lead	<ul style="list-style-type: none">- Lead: RTO9- Support: DMOs
Timeline	<ul style="list-style-type: none">- Year 1 - set up of web portal- Year 2 - enhance and refine
Outcomes	<ul style="list-style-type: none">- Better sharing and usage of data and research

Easy to Access

Relevant

Partnership

The screenshot shows the top navigation bar with categories: Our Perspectives, Consumer and Business Research, RTO9 Performance, and Tourism Economy & Outlook. Below this is a large image of a person carrying a canoe on their shoulder near a lake with autumn foliage. A 'Find Out More' button is visible. Below the image, there's a text block: 'Research and Insights Hub is RTO9's portal for Tourism research, thoughtful perspectives and inspiration to help drive profitable business ideas and innovation in each destination.' Below this are three main content areas: 1. '1000 Islands: Cruise Campaign' featuring a red and white boat and a text block about a joint marketing campaign. 2. 'MONTHLY INDUSTRY INSIGHTS NEWSLETTER' featuring a calendar icon for November 2018 and a text block about monthly insights. 3. 'Tweets by @RTO9_CA' featuring a screenshot of a tweet from @Ray_of_Quinte about online business resources.

Data Sets Analysis

A data sets analysis leverages secondary and primary research sources.



Overview

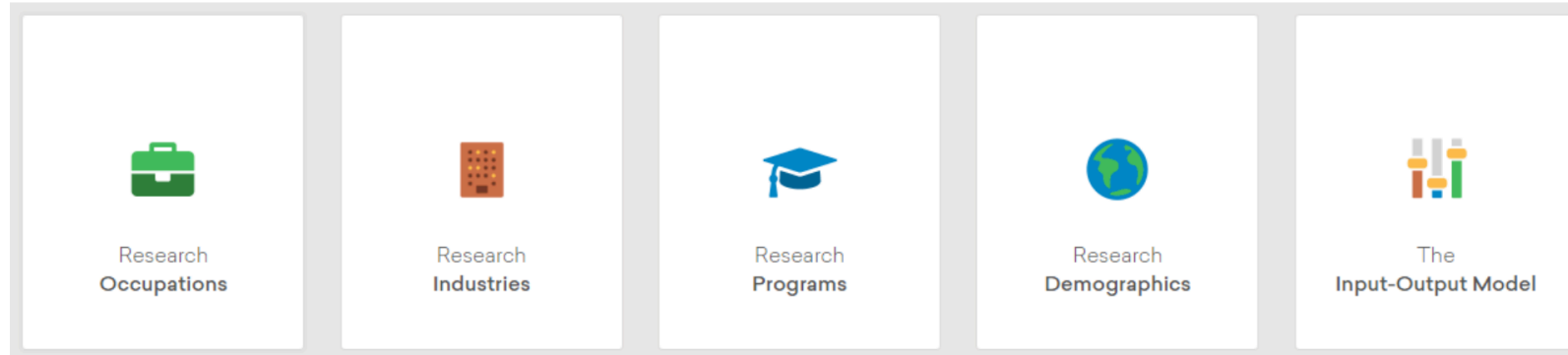
What	Data mining of various government statistics databases to produce a full picture of RTO9's regional tourism numbers (i.e., visitors and spend; jobs; impact; etc.)
How	<ul style="list-style-type: none">- Review of Ontario Ministry of Tourism, Culture and Sport, OMAFRA and Statistics Canada data sets to produce an holistic data picture of RTO9 and DMOs
Lead	<ul style="list-style-type: none">- Lead: RTO9- Support: DMOs/DMPs
Timeline	<ul style="list-style-type: none">- Pilot analysis Year 1 (replication in Year 2 and Year 3 assuming new statistics and data availability)
Outcomes	<ul style="list-style-type: none">- Better understanding of the total value of the tourism economy to RTO9 and DMOs
Metrics	<ul style="list-style-type: none">- Visitor counts; visitor spend; jobs; economic contribution

Why is it important?

With vast amounts of data available, across many different fields, there is an increasing need to turn data into knowledge that can be shared and better understood.

Data sets can be gathered from both traditional and non-traditional methods such as survey reports, Google word searches, social media analytics etc.

- Released State of Tourism Report in January 2019. Utilized data from Ontario Ministry of Tourism, Culture and Sport, OMAFRA and Statistics Canada data sets.





2019 Consumer Insights Surveys

Overview

The Consumer Insights Survey was deployed in summer 2018 by RTO9 and four destinations in the region.



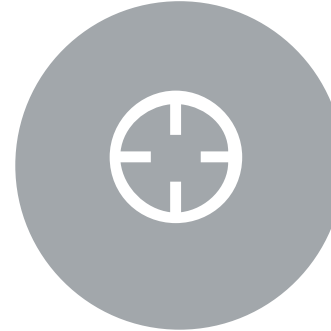
METHOD

- Online
- 11 Minute Questionnaire
- Fieldwork from June 25 – August 10, 2018



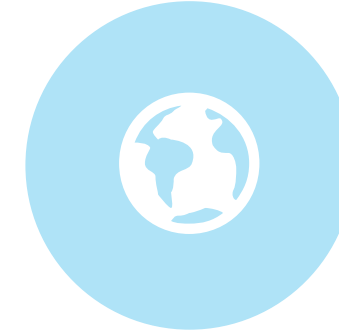
SAMPLE SIZE

- 2,461 total respondents
- South Eastern Ontario (2,185), Kingston 1,000 Islands (159), Bay of Quinte (62), 1000 Islands Brockville (42) and Land O Lakes (13)



TARGET

- Overnight Pleasure Travellers, who: took an overnight trip in the last two years to South Eastern Ontario or plan to take an overnight pleasure trip in the next two years



COMMUNICATION

- Consumer databases of RTO9 and five Destination Marketing Organizations (DMOs), social media and Tourism Talk were used to reach the target group

Questionnaires

Through a collaborative effort we were able to reach our target group more effectively.

- Separate questionnaires were developed for the South Eastern Ontario region and our eight destinations.
- The questionnaires contained two series of questions:

Destination Specific

- Awareness
- Propensity to travel

Standard

- Reason for visiting
- Activities participated in
- Media habits
- Booking methods
- Length and time of travel
- Spending and perceptions of value
- Travel mode to destination
- Accommodation choice
- Overall trip satisfaction
- Leisure travel interests

Questionnaires, cont'd

Discussion: Review of questions and their value.

1. What are your key issues?
2. What other questions need to be asked?
3. What are the “nice to know” and “need to know” questions?
4. What do your operators need?

Communication

Through a concerted effort, the survey was emailed to the target group and promoted on social media channels.

- Consumer databases were utilized, which in total was 60,560 contacts. The response rate ranged from > 1% to 7%.
- Websites, Twitter, Facebook, Newsletters and e-blasts were used to encourage and prompt more survey responses.



Take the South Eastern Ontario
consumer insights survey and you could WIN
a getaway package valued at \$500 to
Kingston 1000 Islands!

[TAKE SURVEY NOW](#)

With your input we can keep improving our tourism
products and experiences for valued visitors like you!

Thanks for your participation!

Lessons Learned

There were three key lessons learned during the pilot that we can use to improve the survey in 2019.



1. Why?

Better management information and understanding of target markets = positive business outcomes for tourism partners across the region.

2. When?

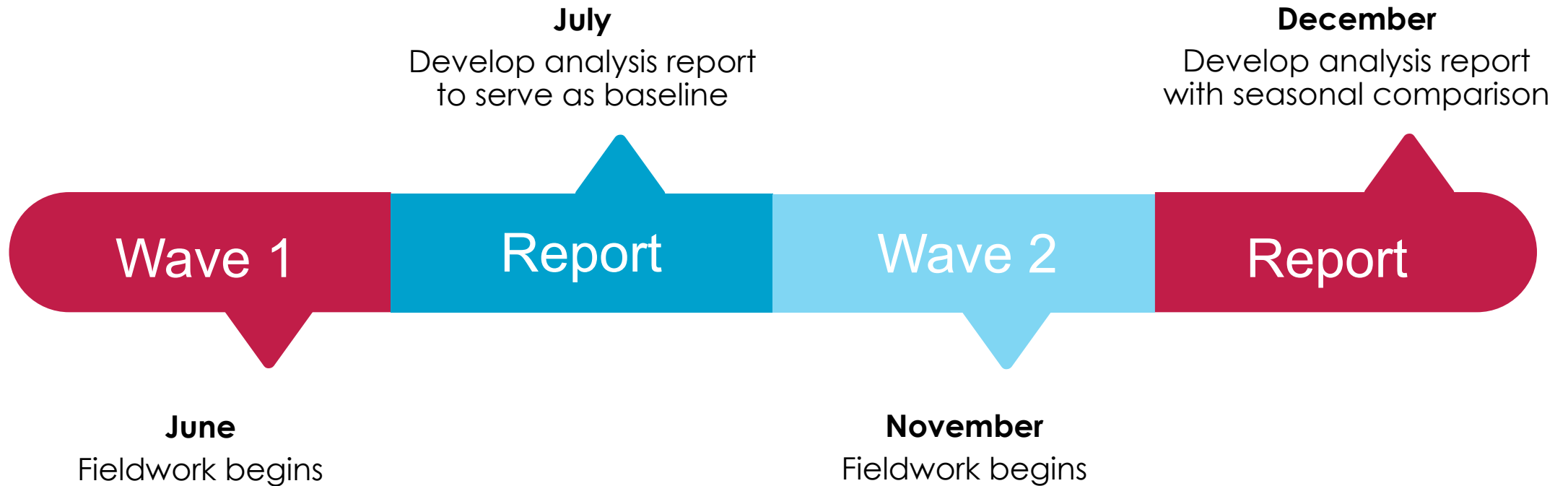
All questionnaires should deploy at the same time and ideally the first prompt will occur within 48-72 hrs. Generally, 80% of responses come in within the first week of deployment.

3. How?

The survey is dependent on accurate consumer databases. All destinations should ensure they have a viable database management strategy to accurately keep track of consumers and add new consumers regularly.

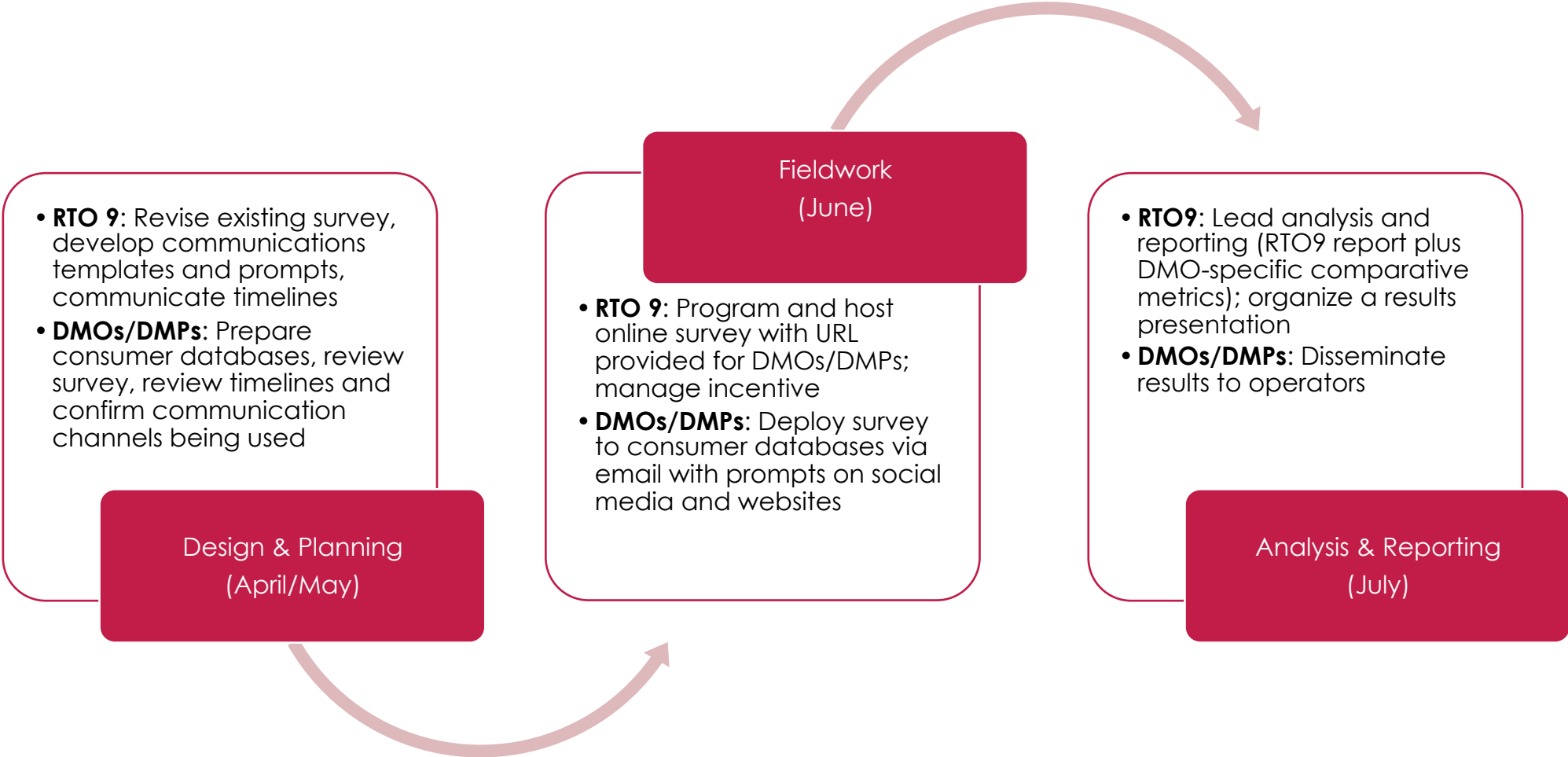
Vision for 2019

A two wave survey process will allow us to develop and a baseline for seasonal comparison and tracking.



Wave 1: Timeline Overview

To ensure a successful roll out there are three defined phases for the survey with corresponding roles for RTO9 and the DMOs/DMPs.



Wave 1: Key Dates

The proposed survey period is June 17 – 24.

	Tasks	Responsible Party	Timeframe
1. Survey Design & Planning	<ul style="list-style-type: none"> a. Review and revise existing survey b. Develop communication templates and prompts c. Develop timelines d. Prepare consumer databases e. Review draft survey f. Confirm timelines g. Confirm communication channels and number of contacts 	<ul style="list-style-type: none"> a. – c. RTO9 d. – g. RTO9/DMOs/DMPs 	April 1- May 31, 2019
2. Field Work	<ul style="list-style-type: none"> a. Program and host online survey with URL b. Manage incentive c. Deploy survey d. Manage survey prompts e. Close survey 	<ul style="list-style-type: none"> a. – b. RTO9 c. – e. RTO9/DMOs/DMPs 	June 1 – June 30, 2019 [Proposed survey period June 17-24]
3. Analysis & Reporting	<ul style="list-style-type: none"> a. Data analysis b. Develop reports c. Disseminate results 	<ul style="list-style-type: none"> a. – b. RTO9 b. – c. RTO9/DMOs/DMPs 	July 1 – 31, 2019
4. Evaluate	<ul style="list-style-type: none"> a. Obtain feedback from DMOs/DMPs 	<ul style="list-style-type: none"> a. RTO9 	August 1 – 15, 2019

Research Question?

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